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Global Environmental Governance in Transition and China's Strategic Reorientation

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Abstract

¹ Following Donald Trump's inauguration as the 47th President of the United States in January 2025, U.S. energy and environmental policies centered on the "America First" doctrine have significantly disrupted the global environmental governance system established under the Paris Agreement. While China faces unprecedented developmental challenges, these circumstances also present strategic opportunities. China can potentially assume a leadership role in global green development while simultaneously strengthening domestic technological innovation and self-reliance, and developing new frameworks for global environmental governance. This article suggests that China's response should focus on "establishing strategic autonomy as the foundation, advancing multilateral initiatives as the pathway, and implementing precise strategic measures as the safeguard," thereby providing theoretical and policy frameworks for China's targeted engagement in the new era.

Keywords: Trump 2.0; Global Environmental Governance; Strategic Autonomy; Multilateralism

I. Introduction: From Prediction to Reality —A Fundamentally Altered Strategic Environment

The second term of the Trump administration emerges within a transformed global context marked by intensifying climate disasters, an energy geopolitics revolution precipitated by the Russia-Ukraine conflict, and heightened strategic competition between China and the United States. Under these conditions, the administration's energy and environmental policies have evolved beyond domestic considerations to become integral components of a new "Viceroy-style" grand strategy aimed at restructuring the international order. Through executive orders, public funding legislation, and strategic diplomatic initiatives, the administration has systematically implemented its campaign platform. The implications for global environmental governance have shifted from theoretical concerns to pressing challenges requiring immediate international attention and response.

As the analytical framework transitions from predictive planning to evidence-based assessment and real-time response, this article examines the key policies implemented by the Trump 2.0 administration and their widespread implications. It analyzes the strategic logic and capability development underlying its disruption of established global environmental governance, while reassessing China's national strategic objectives and approaches within this emerging paradigm, seeking to advance both national and global interests during a period of international upheaval.

II. The Trump 2.0 Administration's Practical Deconstruction and Paradigmatic Restructuring of Global Environmental Governance

The Trump 2.0 administration has demonstrated decisive action and strategic coherence. Its objective centers on eliminating perceived constraints that "climate alarmism" places on U.S. economic sovereignty and energy dominance, while optimizing the economic advantages of American fossil fuels and expanding U.S. geostrategic influence.

(I) Changes in the Governance System: From "Multilateral Withdrawal" to "Systemic Rule

Deconstruction and Institutional Paralysis"

1. "Pulling the Rug Out" and "Permanent" Withdrawal from the Paris Agreement

In contrast to the prolonged withdrawal process of the first term, the Trump 2.0 administration expeditiously invoked domestic legal authority to announce an "immediate and permanent" withdrawal from the Paris Agreement, citing economic sovereignty concerns. This decisive action, combined with the cessation of contributions to key ⁸multilateral climate funds including the Green Climate Fund (GCF), transmitted an unmistakably negative message globally. The resultant "chilling effect" manifested immediately: during subsequent UNFCCC COP30 preparatory meetings, nations including Brazil, Saudi Arabia, and Russia adopted more assertive positions regarding emission reduction transparency and financial obligations, explicitly advocating for reduced oversight of developing country actions, thereby impeding negotiations. The withdrawal of funding by the United States, as the largest historical emitter and developed economy, created substantial deficits in global climate finance, significantly compromising the capacity of ²developing nations, particularly Least Developed Countries (LDCs) and Small Island Developing States (SIDS), to address climate change.

2. Strategy of "Institutional Paralysis" Targeting Multilateral Bodies

Departing from the simplistic withdrawal threats of version 1.0, the Trump 2.0 approach adapts to contemporary globalization, networking, and post-truth dynamics, implementing "internal constriction" within major power diplomacy to influence target entities through institutional mechanisms. Beyond appointing climate science skeptics as key negotiators, the intervention manifests through positioning hardline representatives who consistently obscure the social implications of fossil fuel trade and polluting products through extreme interpretations. The administration actively cultivates a "status quo maintenance alliance" among member states, employing unilateral protectionist measures to diminish climate action plans' substantive elements – effectively legitimizing fossil fuels. At the Rio COP30 conference focused on pre-2025 outcomes, U.S. representatives and allies utilized internal disagreements to impede progress on establishing post-2025 collective quantified finance goals, attempting to redirect focus from emission reductions to fossil fuel technology considerations, undermining multilateral negotiation efficacy.

3. Practical Offensive to Subvert ³the "Common But Differentiated Responsibilities" Principle

This foundational ³principle of global climate governance ethics and politics faces systematic challenges from the Trump administration, both rhetorically as an "unfair treaty to the U.S." and practically through bilateral and regional agreements. Through revised environmental provisions in the USMCA and U.S.-Australia Energy Security Partnership Treaty, the administration links "opposition to trade discrimination" with "rejection of Paris Agreement-based special treatment for developing countries in trade and investment rules." This strategic approach aims to initially invalidate the CBDR principle regionally, establishing precedent and support for its comprehensive rejection globally.

(II) Changes in Energy Strategy: From "Domestic Revival" to Building a "Global Energy Nationalism Alliance"

1. "Energy Dominance 2.0": Comprehensive Deregulation and Strategic Incentives for Domestic Fossil Fuel Production

The "Energy Dominance Executive Order 2025" represents the foundational document of Trump's energy policy. This executive order systematically reversed key Biden-era policies, including the Clean Power Plan and new Methane Emissions Rules. ¹⁰ Under the premise of "ensuring energy security," it authorized the Department of the Interior to make over 90% of federal lands and waters available for oil and gas leasing, while substantially streamlining or eliminating environmental impact assessment requirements. Concurrently, the administration advocated for Congressional passage of the "American Energy Revival Act," which introduced unprecedented tax credits and subsidies for shale oil and gas extraction, next-generation "clean coal" technology, and nuclear R&D, fundamentally altering the market competition dynamics between clean energy and fossil fuels.

2. Constructing an "LNG OPEC" and the Weaponization of Energy Geopolitics

The Trump administration elevates LNG exports to strategic parity with crude oil, utilizing diplomatic channels to encourage other major LNG producers - including Qatar and Australia - to participate in an "LNG Producer Coordination Mechanism" similar to OPEC (alternative proposed names include "LNG Forum," or adding a "Golden Triangle" and "A-Drill". Additional verification is required regarding the existence of such an organization). The initiative aims to maintain global LNG supply equilibrium, stabilize LNG prices, and collectively address green trade ⁵ regulations such as the EU's Carbon Border Adjustment Mechanism (CBAM), while positioning U.S. LNG as an indispensable global strategic resource. This strategy serves to secure various concessions and support from European and Asia-Pacific allies, potentially diminishing their commitment to independent energy transition initiatives.

3. Implicit Institutionalization of the "High-Carbon Club"

Despite significant divergences on conventional geopolitical matters, the U.S., Saudi Arabia, Russia, and other traditional oil producers have established a de facto alliance to sustain global fossil fuel demand and collectively oppose aggressive global decarbonization initiatives. This "High-Carbon Club" harmonizes positions in forums such as the International Energy Forum (IEF), exerts collective pressure on institutions like the International Energy Agency (IEA) to moderate their 2050 net-zero roadmap ambitions, and promotes pro-fossil fuel narratives and advocacy globally, creating substantial external resistance to global green transition efforts.

(III) Changes in Competition with China: From "Trade Friction" to "Systematic Green Containment and Supply Chain Decoupling"

1. The Descent of the "Green Iron Curtain": Comprehensive Tariffs and Strategic Supply Chain Decoupling

In mid-2025, following a renewed "Section 301" investigation, the Trump administration implemented prohibitive tariffs (100%) on ⁶ China's "New Three" (new energy vehicles, lithium-ion batteries, solar panels), citing "national security" and "overcapacity" concerns, along with elevated tariffs on wind towers and essential critical minerals (refined rare earths, cobalt, lithium). The "Securing America's Clean Energy Supply Chains Executive Order" prohibited the procurement of

renewable energy components or critical materials from Chinese manufacturers for federally funded infrastructure or defense projects. Through authorizing Treasury Department oversight and restrictions on U.S. investment in Chinese green technology firms, it aimed to constrain China's green industry development. This coordinated approach seeks to disconnect China's green industry from global (primarily developed country) supply chains across market, capital, and technological dimensions.

2. Building an "Exclude-China Green Alliance" and the Battle for Rule-Making Power

The U.S. is collaborating with Indo-Pacific Economic Framework (IPEF) and EU partners to develop a "Sustainable Trade Circle" with itself at the center. This alliance establishes fundamental principles: first, implementing rigorous "rules of origin" requiring nearly complete product value creation within the alliance; second, developing a mutually recognized but externally restricted "green product certification system"; third, forming a new "Critical Minerals Supply Chain Security Alliance" excluding China. This indicates that competition with China now focuses comprehensively on controlling green technology standards, carbon accounting protocols, and supply chain security regulations—factors crucial for future global industrial leadership.

3. "Permanent Freeze" of Bilateral Climate Dialogue and the Securitization of the Issue

In contrast to the "cold handling" during the first term, the Trump 2.0 administration explicitly characterized climate change as a "tool employed by China to undermine the U.S. industrial base and gain geostrategic advantage," formally dissolving the U.S.-China Climate Change Joint Working Group through administrative measures. This eliminated the primary high-level dialogue channel between the world's largest carbon emitters and economies in an area with strong global public good characteristics, creating a mutual perception of "zero-sum game" and practical "zero contact" on climate issues, substantially increasing global climate cooperation uncertainty and risk.

III. Reassessment of Challenges and Opportunities for China in the New Era

In the context of fully implemented Trump 2.0 policies and their cascading effects, China faces more tangible and severe challenges, while the window of strategic opportunity remains distinct and requires urgent attention.

(I) Core Challenges and Structural Pressures

1. Sharp Deterioration of the External Market Environment and Resistance to Industrial Upgrading

The implementation of 100% tariff barriers and establishment of the "Exclude-China Green Alliance" have significantly impacted China's green industry access to the premium U.S. market and select allied markets in the near term, posing critical challenges to export-oriented enterprises. More significantly, the reduced direct engagement with premium market consumers may impede the technological advancement and brand enhancement of China's green industry through market feedback mechanisms, potentially constraining its position within the global value chain.

2. Significant Increase in Technology Iteration and Supply Chain Security Risks

Chinese enterprises operating in advanced green technology sectors, including high-performance computing chips for intelligent EVs, high-end wind power bearings, next-generation high-efficiency photovoltaic materials, and low-cost long-duration energy storage systems, face substantial operational risks due to U.S. export restrictions and investment controls. The established global R&D and international collaboration networks in these technologies risk disruption from U.S. interventions, potentially decelerating worldwide energy transition technological advancement and cost reduction efforts, including within China.

3. The "Responsibility Trap" of Global Governance Leadership and the Discourse Power Dilemma

In the context of U.S. strategic disengagement and persistent attribution of responsibility to China, international stakeholders, including developing nations, increasingly expect China to assume emission reduction and funding obligations beyond its "developing country" status and current capabilities. Excessive commitments would exceed China's development stage and restrict economic growth and energy security; maintaining current positions risks characterization by U.S.-influenced media as an "emerging hegemony avoiding responsibility," compromising China's position in global discourse and moral standing.

4. Direct Threat of Global Physical Risks and Externality Import

The "high-carbon lock-in" effect of global emissions influenced by U.S. policies has rendered the Paris Agreement's 1.5°C temperature target virtually unachievable. As a nation with diverse geographical and climatic conditions, China faces increasing exposure to climate-related disasters, including intensified river basin flooding, sustained northern droughts, northward pest migration, and coastal threats from rising sea levels. These phenomena pose escalating risks to China's food security, water resources, public safety, and socio-economic stability.

(II) Strategic Opportunities and Transformation Windows

1. "Historic Vacancy" in Global Green Leadership and Agenda-Setting Power

The substantial void created by U.S. withdrawal presents a significant deficit in global public goods provision and leadership, offering China an unprecedented opportunity to advance from "active participant" to "key leader." This enables greater influence in global agenda formation, such as initiating comprehensive "Global Clean Energy Partnership Initiatives" or incorporating "Ecological Civilization" and "Harmonious Coexistence between Humanity and Nature" into the Kunming-Montreal Global Biodiversity Framework implementation. This opportunity enables China to establish a new environmental governance paradigm, enhancing its institutional influence and soft power.

2. A Powerful Forcing Mechanism for "Internal Circulation" and Technological Self-Reliance

While external restrictions create immediate challenges, they ultimately serve as catalysts for domestic innovation. China's "Dual Carbon" goals and technological self-reliance strategies demonstrate strategic alignment. Through coordinated national efforts, China possesses the capacity to advance breakthrough developments in frontier technologies including perovskite/crystalline silicon tandem solar cells, thorium-based molten salt reactor nuclear energy,

all-vanadium flow battery storage, and green hydrogen, potentially securing leadership in global green technology innovation.

3. Consolidation and Expansion of the "Global South" Green United Front

U.S. disengagement from global climate initiatives and unilateral actions have heightened developing nations' recognition of China as a stable, reliable partner offering unconditional cooperation. Through the Belt and Road Initiative (BRI) International Green Development Coalition and Global Development Initiative (GDI), China can deliver cost-effective green solutions to developing nations, strengthen collaboration in infrastructure, energy, and climate response, establishing a robust international alliance to counterbalance U.S. strategic influence.

4. Strategic Space to Exploit U.S.-Europe Green Rifts

Trump's trade protectionist policies and fossil fuel expansion contradict the EU's Green Deal-oriented sustainable development initiatives. This divergence creates opportunities for enhanced China-EU cooperation. Both parties can pursue carbon market integration, hydrogen technology standardization, and expanded green investment collaboration in third-party markets, particularly in Africa, to maximize mutual benefits.

IV. China's Strategic Response Policy Framework

In response to a fundamentally altered strategic environment, China's strategy must evolve from "predictive planning" to "practical implementation," establishing a comprehensive action system that is multi-dimensional, multi-layered, and highly coordinated.

(I) Internal Dimension: Strengthen Strategic Autonomy, Forge a Green Resilience System

1. Deepen Revolutionary Transformation of the Energy Structure Centered on Building a "New Energy System"

The priority extends beyond merely expanding renewable energy capacity to establishing a modern energy system where "new energy serves as the foundation, coal power provides flexible regulation and strategic support, and power grids at all levels are intelligently interconnected." The state must make substantial investments in upgrading cross-regional ultra-high voltage transmission corridors, constructing comprehensive distributed smart microgrids, and implementing large-scale, long-duration energy storage facilities. This approach addresses fundamental challenges of new energy integration and stability at the system level, ensuring energy security through domestic capabilities.

2. Launch and Implement the National "Green Technology Self-Reliance and Strengthening" tackling key problems Plan

The establishment of a national "Green Technology R&D Fund" is recommended, implementing "unveiling the list and appointing the best" and "horse racing" mechanisms. This initiative focuses on addressing critical industrial chain challenges, including low-carbon purification of photovoltaic silicon materials, low-cost large-scale energy storage, efficient hydrogen production-storage-transportation, and CCUS. The goal is to leverage industry, academic, and

research expertise to overcome foreign supply chain dependencies in vital sectors within 3-5 years, aiming to achieve leadership in 1-2 core technologies globally.

3. Comprehensively Activate and Upgrade the Domestic Green Consumption Market

Implementation of nationwide incentive programs, including "green consumer goods replacement," "subsidies for PV-storage-direct-flexible buildings," and "smart grid household renovation," aims to stimulate domestic green consumption. China's extensive unified market serves as both a "training ground" and "incubator" for developing green technology "hidden champions" and industry leaders that combine global cost competitiveness with core technological advantages and brand recognition.

(II) External Dimension: Cultivate Multilateral Networks, Lead Rule Reshaping

1. Proactively Set the Global Agenda, Provide Inclusive Alternative Public Goods

In UN Climate Change Conferences and Biodiversity Conferences, China should collaborate with major emerging economies including India, Brazil, South Africa, and Indonesia to propose a "Nationally Determined Contribution+" enhancement plan. This framework, based on "respective national circumstances, capabilities, and different stages of development," should offer greater flexibility while emphasizing actionable measures and development rights, fostering broad international cooperation to counter U.S. influence and preserve multilateral frameworks.

2. Promote the BRI Green Development into an "Era 2.0 of Intensive Cultivation"

The strategic focus should shift from "project going global" to "systematic production capacity cooperation + standard output." In strategic regions including ASEAN, the Middle East, Central Asia, and Africa, select suitable countries for joint development of "Low-Carbon Transition Demonstration Zones" or "Green Economic Special Zones." These initiatives should integrate China's advanced new energy technologies, grid management expertise, and carbon accounting standards with local development requirements to establish widely accepted regional standards.

3. Build "De-American-Centered," Diverse, and Multi-layered Cooperation Alliances

(1) China-Europe Green Technology Consortium

Capitalize on emerging U.S.-Europe policy divergences by establishing "China-Europe Joint Green Technology R&D Centers" with the EU and key nations like Germany and France, emphasizing frontier research, intellectual property sharing, and collaborative third-party market development for mutual benefit.

(2) Global South Climate Partnership Program

Expand the "Climate Change South-South Cooperation Fund" with targeted allocation. Prioritize support for SIDS and LDCs in advancing disaster prevention/mitigation, climate-resilient agriculture, and seawater desalination, converting cooperation into diplomatic capital while fostering international collaboration.

(3) BRICS+ Green Transition Cooperation Mechanism

Formalize a "Green Energy and Supply Chain Cooperation Working Group" within the BRICS framework. Facilitate coordinated sustainable development of critical mineral resources among member states, promote green technology transfer, and establish mutual recognition of green

standards to ensure internal efficiency and external influence.

(III) U.S.-Facing Dimension: Precise Countermeasures, Risk Control, and Bottom-Line Thinking

1. Conduct Trade Countermeasures According to Law and Actively Utilize Multilateral Dispute Settlement Mechanisms

In response to unilateral tariff measures that contravene WTO regulations, China should implement precise reciprocal countermeasures based on domestic legislation such as the Foreign Trade Law. Concurrently, China should collaborate with similarly affected trading partners, including the EU and South Korea, to initiate joint legal proceedings within the WTO framework, highlighting the protectionist nature of these actions through legal channels and increasing the associated political and economic costs.

2. Strengthen "Second Track" and "Non-Governmental" Professional Dialogue Channels

Given the current suspension of government-level dialogue, substantial support should be directed toward enabling premier Chinese universities, national research institutions, and authoritative industry alliances to maintain communication channels with their U.S. counterparts (think tanks, national laboratories, professional associations). This engagement should focus on technically oriented topics with minimal political sensitivity, such as joint extreme weather early warning systems, grid security and resilience, and precise methane emission monitoring, aiming to preserve essential information exchange and professional trust.

3. Deepen Substantive Cooperation with U.S. "Climate States" and Pragmatic Enterprises

Acknowledging the dual nature of the U.S. political structure, it is strategic to circumvent federal barriers by establishing direct cooperative relationships with state governments such as California, New York, and Washington, which maintain progressive climate policies. Implementation should focus on pilot projects in carbon market linkage, zero-carbon transportation standards, and green financial innovation. Additionally, support should continue for Chinese green technology enterprises engaging with U.S. state governments and business partners who recognize the value of Chinese market participation and technological collaboration, utilizing local and market mechanisms to address federal-level political constraints.

V. Conclusion

Recent developments demonstrate that global environmental governance has entered a period characterized by bloc confrontation, regulatory weaponization, and energy nationalism. Environmental and climate issues, fundamental to global public goods, have become integral to major power strategic competition. The U.S. has implemented a comprehensive green containment strategy, encompassing multilateral rule reconstruction, formation of an energy nationalist alliance, and implementation of broad green restrictions.

For China's national development trajectory, this represents the most significant systemic external challenge since the reform and opening-up period in global governance participation. However, these challenges present concurrent opportunities. This unprecedented pressure is catalyzing

China's transition from an "important participant" to a "key leader" in global environmental governance. Success depends not on external actions, but on China's capacity to transform containment pressure into reform momentum, convert technological restrictions into innovation imperatives, and utilize U.S. unilateral actions to strengthen solidarity with the "Global South" in promoting cooperative development.

China's strategic direction requires maintaining autonomous development while integrating "Dual Carbon" objectives into high-quality development initiatives. Simultaneously, with enhanced historical initiative and strategic confidence, China must uphold multilateralism principles. Through providing comprehensive global green public goods, China should guide the international community in establishing an equitable and effective global environmental governance framework. This period of global transformation will ultimately demonstrate the authentic guardians and pioneers of humanity's collective welfare and Earth's sustainable future.

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